



*User rights management tool:*

- *How to effectively assign and manage roles to users.*
- *Understanding District Level vs School Level and Roles vs Application Tasks.*
- *Overview and demonstration of Person Assignment, User Roles and Information functions.*



## Data Management Tools

- **OTIS** – Online Tool for IT Support
- **Administration Tool**
- **EDUID** - Education Unique Identification
- **IDCI** – Idaho District Contact Information



PROVIDED BY THE IDAHO STATE DEPARTMENT OF EDUCATION

Different methods of obtaining access to the Admin Tool

Authorization Form



**OTIS**

Online Tool for IT Support

SDE Support





## OTIS – Online Tool for IT Support

- Report technical issues
- Communicate Personally Identifiable Information (PII) securely
  - Notes
  - Attachments
- Designed for District Users
- Users are provisioned
  - Superintendent or designee
  - IT Director



PROVIDED BY THE IDAHO STATE DEPARTMENT OF EDUCATION

Because of Data Security, we are implementing a new way of submitting your EDUID Corrections. Instead of using an SFTP website to upload your EDUID corrections, you will access OTIS and attach an Excel file.



# OTIS – Online Tool for IT Support

- Access through ISEE portal
- My Applications



Log Offcncmurray@eduidOTIS

Links

Home

Actions

My Tickets

Create A Ticket

Search Tickets

Queues

Cheryl McMurray

ISEE Technicians

Locked Tickets

5518-Updated grad data

7743-Student Demographics Corrections

8009-Student Demographics Corrections

Welcome to OTIS

OTIS At a GlanceOTIS Overview



Welcome to the Idaho State Department of Education's Online Tool for IT Support - OTIS.

The purpose of OTIS is to help the SDE IT department provide better service in responding to technical issues and to facilitate the communication of Personally Identifiable Information (PII) securely.

Users may create their own OTIS tickets or they may have the SDE IT team create tickets for them. Once tickets have been created, users can monitor their progress and add additional notes or attachments.

This system is for use by SDE employees and designated District Users only. Other users should contact the Director of the [Program](#) they are working on for usage assistance or the IT Support Desk ([support@sde.idaho.gov](mailto:support@sde.idaho.gov)) for technical assistance.

PROVIDED BY THE IDAHO STATE DEPARTMENT OF EDUCATION



# OTIS – Online Tool for IT Support

[Log Off](#)[testrole3@testrole.org](#)

OTIS

## Links

[Home](#)

## Actions

[My Tickets](#)[Create A Ticket](#)[Search Tickets](#)

## Create A Ticket

[New Ticket](#)[Help](#)[Create Ticket](#)

Requestor	Priority	Type
Name: SDE Support Testing	<input type="radio"/> 5-Standard ? <input type="radio"/> 4-Normal ? <input type="radio"/> 3-Important ? <input type="radio"/> 2-High ? <input type="radio"/> 1-Urgent ?	Ticket Type: --Select Type--
Phone: 		
Email: testrole3@testrole.org		
Summary: (50 characters max, No Personally Identifiable Information?)		Attachments: <a href="#">Add</a>
Description: <div></div>		

[Create Ticket](#)

PROVIDED BY THE IDAHO STATE DEPARTMENT OF EDUCATION

# Administration Tool

SDE Support







## Administration Tool

**The Administration Tool (Admin Tool) is the security application that allows the SDE and local Districts to manage access to SDE supported web applications and SDE reports. User permissions and application access is managed by assigning User Roles to Users and assigning Usernames to a Person/EDUID.**



PROVIDED BY THE IDAHO STATE DEPARTMENT OF EDUCATION

FERPA - The Family Educational Rights and Privacy Act commonly referred to as FERPA is a Federal law that protects the privacy of student education records. (20 U.S.C. § 1232g; 34 CFR Part 99)

The law applies to all schools that receive funds from the U.S. Department of Education.

Similar to medical HIPPA laws, under FERPA, the Idaho State Department of Education, local school districts, and charter schools are mandated to protect the privacy of student education records.

Stakeholders to student information can range from the Student, Parent, Teacher, School Employees (Counselors, Curriculum Directors, etc.), Principals, Business Managers, Superintendents, to employees at the SDE.

While there are several stakeholders, the SDE, local school districts, and charter schools must administer a secure educational data system, where School Districts assign authorization and access to student information (such as demographics, assessments, performance, etc) to a limited number of stakeholders who have a legitimate use or necessity for that student information.

For example: A principal has a vested interest in the academic performance of a student in his/her school. A counselor from one elementary school does not have a vested interest in the academic performance of a student from a separate middle school in another town, therefore the State Department of Education and the local



school districts must work together to keep access and authorization current.


Ultimately, from the State Department of Education's perspective: It must administer the infrastructure where student information is created, stored, and accessed. Local schools districts are charged with assigning access to specified stakeholders.



# Administration Tool

Who has access:

- **Superintendent**
  - Provisioned only by SDE with signed Access Authorization form
  - <http://www.sde.idaho.gov/tech-services/isee/index.html>
- **Superintendent's Delegate**
  - Provisioned only by SDE with signed Access Authorization form
- **Technology Director**
  - Provisioned by District Superintendent, Delegate or a currently assigned Technology Director



PROVIDED BY THE IDAHO STATE DEPARTMENT OF EDUCATION

The Admin Tool has a limited number of users:

Superintendent  
Superintendent's Delegate  
Technology Director

These limited users provide access and authorization to the vast users of SDE applications across the state.

The limited # of users is by design. It protects educational data and reduces liability by limiting the number of users who can provide access to education information.



# Administration Tool

## Purpose:

- **Assign**
  - Add users to specific roles
- **Remove**
  - Remove users from roles
- **Map**
  - Map users to EDUID records
- **Verify**
  - Verify user assignments



PROVIDED BY THE IDAHO STATE DEPARTMENT OF EDUCATION

Stress importance of keeping the user roles up-to-date

The admin tool has 4 primary functions:

Verify assigned roles to Users, Assign and Un-assign User Roles, map usernames to Person Names (remember: the User Name is the individual's email address or ADFS username)-ensuring the User Name and Person are the same individual



# Administration Tool



IDAHO  
STATE DEPARTMENT OF EDUCATION



Log On

Administration

## Admin Tool Link



<https://apps.sde.idaho.gov/administration>



PROVIDED BY THE IDAHO STATE DEPARTMENT OF EDUCATION

### Administration Tool Application

This information is presented by the Idaho State Department of Education with the intent of providing you detailed information for a more solid understanding of the Administration Tool's full functionality and proper operation. This presentation provides step by step instruction on how to gain proper authorization, access and operate functions within the Administration Tool.



Navigating to the Admin Tool.

Create bookmark/favorite

Home page and available links; Information, Person Assignment, User Role.

Admin Tool Training Manual for complete details

Switch to live application for show and tell



# Administration Tool

- SDE Users
  - [Information](#)
    - Admin Tool District Roles spreadsheet
  - [Person Assignment](#)
- SDE Programs
  - [User Roles](#)

PROVIDED BY THE IDAHO STATE DEPARTMENT OF EDUCATION

User Roles –

Select District or Building to provision roles

IMPORTANT NOTE: Start to type all entries and select from drop down list. Always username, NEVER common name

(+) – add username. ALWAYS start to type username, NOT common name, and select from dropdown list, select and press submit

(x) – remove username

NOTES: Why does common name show? Why does email address show?

SchoolNet roles/descriptions – docs found on ISEE page

<http://www.sde.idaho.gov/site/isee>



## Administration Tool

### Best Practices:

- Text Box Fields
  - Always start to type text and select from drop down list
- Usernames, NOT Person Names
  - Always use usernames, NEVER person names
- District/Building level Roles
  - There is a difference
- SRM Roles
  - Assigned by SDE, with authorization from District

PROVIDED BY THE IDAHO STATE DEPARTMENT OF EDUCATION

- Text Box fields
  - Always start to type text and select from drop down list
- Usernames, NOT Person Names
  - Always use usernames, NEVER person names
  - Non-ADFS members – typically district email address
  - ADFS members – typically district network username
- District/Building level roles



- There is a difference
- **Schoolnet Roles**
  - Teacher role only through ISEE upload
- **SRM/ISEE Roles**
  - Assigned at the SDE, with permission from District Admin Tool user

**EDUID**

Education Unique Identification

SDE Support





## **EDUID** Educational Unique Identification

A system that allows the lookup, verification, and assignment of unique identifiers for people in the state of Idaho's education system.

- Requires Users to be registered
- Requires User to have the EDUID role provisioned
- Role granted by Access Authorization Form

PROVIDED BY THE IDAHO STATE DEPARTMENT OF EDUCATION

So how do you obtain an EDUID?

Through the use of the EDUID Application.

- Requires Users to have a registered username.
- Requires Users to have EDUID Application permissions.
- Authorization is granted through submitting Authorization form to SUPPORT from Superintendent or charter school administrators email address.
- Mail hard copy of form to SDE.



## EDUID Educational Unique Identification

### Things to remember:

- Spaces and hyphens do not affect search results
- First, Middle and **Suffixes** are Given Names
- Last Names are Family Names
- Gender & DOB also required



PROVIDED BY THE IDAHO STATE DEPARTMENT OF EDUCATION



## **EDUID** Educational Unique Identification

### **Naming Guidelines**

**Search carefully before creating a new EDUID!!!**

If creating a new EDUID, be sure to:

- Use the name exactly as it appears on the legal documentation
- Do not add hyphens or other characters if they do not appear on the legal documentation
- Do not include nick names or "also known as" names in legal name fields

PROVIDED BY THE IDAHO STATE DEPARTMENT OF EDUCATION

Consistency in naming is critical to maintain accurate records and reporting as students migrate across school districts, charter schools, and other states.



## **EDUID** Educational Unique Identification

### **Naming Guidelines, cont.**

Examples of a legal document are:

- **Birth Certificate**
- **Court Document**
- **Marriage Certificate**
- **State Driver's License**
- **State Issued ID**
- **Tribal Identification**
- **Certified Degree of Indian Blood (CDIB)**

PROVIDED BY THE IDAHO STATE DEPARTMENT OF EDUCATION

The full legal name should be used to the extent possible



## **EDUID** Educational Unique Identification

### **Name/Gender changes**

Examples of acceptable documents for name/gender changes include:

- Marriage Document
- Divorce Decree
- Certificate of Naturalization (with new name)
- Court order for new name change
- Adoption papers
- New Birth Certificate (post adoption)
- Tribal Enrollment Verification

PROVIDED BY THE IDAHO STATE DEPARTMENT OF EDUCATION

If a name change occurs, the guardian must present a court document with the new name prior to changes in any record keeping system (i.e. a legally separated guardian cannot change the name of the student without a legal document signifying a name change)





## **EDUID** Educational Unique Identification

EDUID Link

<https://apps.sde.idaho.gov/EDUID>

Naming guidelines

[http://ies.ed.gov/ncee/edlabs/regions/northwest/pdf/REL\\_2016158.pdf](http://ies.ed.gov/ncee/edlabs/regions/northwest/pdf/REL_2016158.pdf)



PROVIDED BY THE IDAHO STATE DEPARTMENT OF EDUCATION

Direct EDUID Application Link.



## **EDUID** Educational Unique Identification

### **Common Entry Mistakes:**

Birth Date Transposition – 9/6/2002 instead of actual birthdate 6/9/2002

First/Last Name Transposition – James Alexander as opposed to correct Alexander James

Incomplete Name – Roswell Allen Josephs. Full name should be Roswell Allen Grey-Josephs

Phonetic Error – Bibiana O'Hare. Should be Viviana O'Hare.

Dual Phonetic Errors – Phred Head. Should be Fred Hed

Nick Names – Timmy Thomas Hoolihan. Should be Timothy Thomas Hoolihan



PROVIDED BY THE IDAHO STATE DEPARTMENT OF EDUCATION



## EDUID Educational Unique Identification

### Submitting EDUID Corrections

- OTIS – Online Tool for IT Support



PROVIDED BY THE IDAHO STATE DEPARTMENT OF EDUCATION

Because of Data Security, we are implementing a new way of submitting your EDUID Corrections. Instead of using an SFTP website to upload your EDUID corrections, you will access OTIS and attach an Excel file.





## IDCI – Idaho District Contact Information

- SDE Communications
- Mailing Lists
- Searchable Contact Info
  
- Designed for SDE and District Users
- Users are provisioned
  - Superintendent or designee
  - IT Director



PROVIDED BY THE IDAHO STATE DEPARTMENT OF EDUCATION



## IDCI – Idaho District Contact Information

- ISEE Required Data Collection Elements and Templates
  - Program Contacts File
  - ID Unit Record Collection Items and Option Sets
    - Option Sets Document Map
      - Program Contact Roles



PROVIDED BY THE IDAHO STATE DEPARTMENT OF EDUCATION

Program Contact template can be found on the ISEE homepage under **ISEE Required Data Collection Elements and Templates**

The option set contains all of the Program Contact Roles



## IDCI – Idaho District Contact Information

- ISEE Portal
- My Applications
- IDCI - Idaho District Contact Information



PROVIDED BY THE IDAHO STATE DEPARTMENT OF EDUCATION





# Search



- Quick Search
- Advanced Search
- District Search



PROVIDED BY THE IDAHO STATE DEPARTMENT OF EDUCATION



# Mailing Lists

- Superintendents
- Building Principals
- School Counselors
- Etc.



PROVIDED BY THE IDAHO STATE DEPARTMENT OF EDUCATION



## Contacts

### SDE Help Desk/Support

- SDE Support (208) 332-6987  
[support@sde.idaho.gov](mailto:support@sde.idaho.gov)

### Region 1 & 2

- Amy Sigler (208) 553-5509  
[asigler@sde.idaho.gov](mailto:asigler@sde.idaho.gov)

### Region 3 & 4

- Cheryl McMurtrey (208) 332-6941  
[cmcmurtrey@sde.idaho.gov](mailto:cmcmurtrey@sde.idaho.gov)

### Region 5 & 6

- Roger Evans (208) 557-8838  
[revans@sde.idaho.gov](mailto:revans@sde.idaho.gov)



PROVIDED BY THE IDAHO STATE DEPARTMENT OF EDUCATION